

Global Plant-based Nonwoven Fabric Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Plant-based Nonwoven Fabric market size is expected to reach \$ 11841 million by 2032, rising at a market growth of 7.3% CAGR during the forecast period (2026-2032).

Plant-based nonwoven fabric refers to sheet, mesh, or felt-like materials made entirely or primarily from renewable plant resources through nonwoven processes such as spunlace, wet web forming, air-laid web forming, spunbond, meltblown, needle punching, or thermal bonding. Raw materials include natural cotton, hemp, bamboo fibers, plant pulps such as wood pulp, bamboo pulp, and crop straw pulp, regenerated cellulose fibers such as viscose, lyocell, and cuprammonium cellulose, and PLA, PHA, and bio-based PE derived from plant resources such as corn and sugarcane. These products typically feature a high proportion of renewable raw materials, good moisture absorption, softness, low carbon footprint, or biodegradability, and are mainly used in fields such as wet wipes, personal care, medical and health, filtration, food packaging, agriculture, apparel and home textiles, and automotive interiors.

Key Findings

Asia Pacific represents the largest regional market supported by extensive nonwoven manufacturing and converting capacity

Regenerated cellulose and wood-pulp materials constitute the principal plant-based raw material group

Spunlace is the leading process for wipes cosmetics and skin-contact

applications

Medical hygiene and personal-care products account for the largest downstream demand base

Competition increasingly centers on plant-based content performance certification and scalable production

Market Trends

The Plant-based Nonwoven Fabric industry is moving from basic substitution of petroleum-derived fibers toward application-specific material engineering. Product development is increasingly focused on plastic-free cellulose structures, 100% plant-based spunlace substrates, binder-free wetlaid materials and PLA-based spunbond products with improved softness and heat-sealing performance. Manufacturers are also combining wood pulp, viscose, lyocell, cotton and bio-based polymers to balance absorption, tensile strength, lint control and converting efficiency. Demand is shifting toward traceable fiber sources, certified forest materials, lower-carbon manufacturing and clearer compostability or biodegradability claims. In consumer applications, brands increasingly require substrates that maintain established tactile and functional performance while reducing fossil-based content. Industrial users are pursuing natural-fiber composites, lightweight acoustic materials and renewable filtration media. The market is therefore evolving from a broad environmental-material category into a group of differentiated technical substrates designed around specific performance, regulatory and end-of-life requirements.

Market Dynamics

Drivers

Growth is driven by restrictions on selected single-use plastics, brand-owner commitments to reduce fossil-derived materials and rising consumer preference for renewable and lower-plastic disposable products. Wet wipes, facial masks, feminine care products, medical consumables, food-contact materials and household cleaning products provide a large addressable demand base because they consume substantial volumes of single-use nonwoven substrates. Improvements in regenerated-cellulose fiber quality, pulp-forming technology and bio-based polymer processing have also

increased material uniformity, softness, wet strength and production stability, allowing plant-based products to enter applications previously dominated by polypropylene and polyester.

Restraints

The main restraints are higher raw-material and processing costs, inconsistent availability of specialty fibers and performance gaps compared with mature petroleum-based nonwovens. Natural fibers and pulp can vary in moisture, cleanliness, fiber length and mechanical properties, while PLA and other bio-based polymers require tightly controlled processing conditions. Fully plant-based structures may encounter limitations in wet strength, barrier performance, thermal resistance or high-speed converting compatibility. In addition, the lack of a universally applied definition for “plant-based” complicates product comparison, procurement standards and market statistics, especially for blends containing both renewable and fossil-derived components.

Opportunities

Major opportunities lie in plastic-free wipes, biodegradable cosmetic substrates, compostable food and beverage filtration materials, medical products with lower fossil content, agricultural seed and plant-propagation materials and natural-fiber automotive components. High-value opportunities are also emerging in products that combine renewable content with specialized functions such as low linting, controlled disintegration, antimicrobial performance, oil absorption, acoustic insulation or heat sealability. Suppliers capable of providing certified feedstock traceability, consistent industrial-scale quality and application-specific technical support are positioned to capture value beyond commodity nonwoven production.

Challenges

The industry must manage green-claim credibility, certification complexity and differences between renewable sourcing, biodegradability, compostability and flushability. Incorrect disposal assumptions can create reputational and regulatory risks even when a product contains a high proportion of plant-derived material. Scaling new feedstock systems without sacrificing machine productivity, product consistency or customer conversion efficiency remains another challenge. Producers are also exposed to pulp, cotton, energy and logistics volatility, while emerging agricultural-residue fibers

require further standardization in pretreatment, purification, fiber formation and supply-chain reliability.

Industry Chain Analysis

The upstream industry consists of cotton, flax, hemp and other natural-fiber suppliers; forestry and pulp producers; viscose, lyocell and cupro fiber manufacturers; PLA, PHA and bio-based polyethylene suppliers; and manufacturers of binders, additives and functional coatings. The midstream covers web formation, fiber blending, hydroentanglement, wet laying, air laying, spunbonding, needlepunching, thermal bonding, finishing, slitting and quality inspection. Value creation depends on translating variable biological raw materials into substrates with stable basis weight, tensile strength, absorbency, purity and converting performance. Downstream converters manufacture wipes, facial masks, medical disposables, hygiene products, tea and coffee filters, food packaging, garments, footwear components, agricultural materials and industrial products. Brand owners and converters increasingly influence upstream material selection through specifications for renewable content, certified sourcing, chemical safety and end-of-life performance.

Segment Insights

By plant-based material content, the market comprises fully plant-based grades containing 100% plant-derived materials, high-content grades containing 70% to below 100%, medium-content grades containing 30% to below 70%, low-content grades containing below 30% and other specialized structures. Fully plant-based grades are most relevant to plastic-free wipes, cosmetic substrates, food-contact materials and premium sustainability-focused products. High-content grades offer a practical balance between renewable content and mechanical or converting performance, while medium- and low-content products are more commonly used where petroleum-derived fibers or binders remain necessary for strength, barrier properties, durability or cost control. Fully plant-based and high-content products are expected to gain relative importance as formulation technology improves and procurement standards become more specific.

From a material perspective, regenerated cellulose and wood-pulp products form the commercial core of the market because they combine established supply chains with high absorbency and compatibility with spunlace, wetlaid and airlaid processes. Cotton occupies an important position in medical, hygiene and cosmetic applications, while

PLA and other plant-derived polymers support spunbond, heat-sealable and structured applications. Agricultural-residue and bast-fiber products remain smaller but offer development potential in automotive interiors, insulation, filtration, agriculture and molded composites.

Downstream Market Opportunities

Medical, hygiene and personal-care applications represent the largest downstream opportunity because plant-based nonwovens provide softness, moisture management and skin-contact suitability for wound-care materials, wipes, feminine care products and cosmetic masks. Food applications create demand for tea bags, coffee filters, absorbent pads and other food-contact substrates requiring purity and controlled liquid transport. Clothing and footwear applications use the materials in interlinings, insulation, linings and disposable garments, while agriculture uses biodegradable crop covers, seed tapes, nursery materials and plant-propagation substrates. Future demand is likely to be concentrated in applications where renewable content can be combined with a measurable functional benefit rather than relying solely on an environmental marketing claim.

Regional Insights

Asia Pacific is the largest production and consumption region, supported by China's extensive spunlace and disposable-product supply chains, Japan's expertise in specialty cellulose and PLA materials, and the region's large hygiene, cosmetics and food-packaging industries. China competes strongly through manufacturing scale, cost control and integrated converting capacity, while Japan focuses more heavily on high-purity cellulose substrates, premium cosmetic materials and specialized biodegradable products. Southeast Asia is developing as an export-oriented production base for spunbond and hygiene materials.

Europe is an important technology and regulatory market, with strong positions in wood-pulp, regenerated-cellulose, wetlaid, airlaid and specialty nonwoven technologies. Demand is supported by plastic-reduction policies and brand sustainability targets. North America has a substantial wipes, hygiene, food-service and medical-products market, supported by established airlaid, spunlace and specialty-material producers. Latin America benefits from access to forestry resources and a growing regional hygiene industry, while other emerging markets offer longer-term potential as nonwoven

consumption and waste-management requirements develop.

Competitive Landscape Analysis

The competitive landscape combines diversified global nonwoven groups, cellulose-material specialists and regional producers with focused technology capabilities. Ahlstrom, Suominen, Freudenberg Performance Materials, Fitesa and Magnera occupy important positions through broad process portfolios, international production networks and relationships with major converters and brand owners. Magnera is the current corporate identity created by the combination of Glatfelter with Berry Global's former Health, Hygiene and Specialties nonwovens and films business, so Glatfelter should not be counted separately in current competitor statistics. Magnera TWE Group, Sandler, Norafin and McAiraid's compete through natural-fiber composites, technical nonwovens, airlaid structures and customized products. Winner Medical, Hangzhou Nbond Nonwovens and D-TEX Nonwovens strengthen China's position in cotton, wood-pulp, viscose, lyocell and bamboo-derived spunlace materials. Unitika, Asahi Kasei and Daiwabo represent Japan's capabilities in PLA, cotton-linter cupro and rayon-based nonwovens. Competition is shifting from simple renewable-content claims toward verified sourcing, processability, functional performance, certification coverage and the ability to supply consistent material at commercial scale.

Report Scope

This report studies the global Plant-based Nonwoven Fabric production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Plant-based Nonwoven Fabric and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Plant-based Nonwoven Fabric that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Plant-based Nonwoven Fabric total production and demand, 2021-2032,
(Tons)

Global Plant-based Nonwoven Fabric total production value, 2021-2032, (USD Million)

Global Plant-based Nonwoven Fabric production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Plant-based Nonwoven Fabric consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Plant-based Nonwoven Fabric domestic production, consumption, key domestic manufacturers and share

Global Plant-based Nonwoven Fabric production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Plant-based Nonwoven Fabric production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Plant-based Nonwoven Fabric production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Plant-based Nonwoven Fabric market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Ahlstrom, Suominen Corporation, Freudenberg Performance Materials, Fitesa, Glatfelter Corporation, TWE Group, Sandler AG, Norafin Industries, McAiraid's Vliesstoffe, Winner Medical, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Plant-based Nonwoven Fabric market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Plant-based Nonwoven Fabric Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Plant-based Nonwoven Fabric Market, Segmentation by Type:

Dry Laid Nonwoven

Wet Laid Nonwoven

Global Plant-based Nonwoven Fabric Market, Segmentation by Raw Material:

Natural Plant Fiber Nonwovens

Wood and Bamboo Pulp Nonwovens

Regenerated Cellulose Nonwovens

Plant-derived Biopolymer Nonwovens

Agricultural Residue Fiber Nonwovens

Others

Global Plant-based Nonwoven Fabric Market, Segmentation by Material Content:

Fully Plant-based Grade (100%)

High Plant-based Content Grade (70%—<100%)

Medium Plant-based Content Grade (30%—<70%)

Low Plant-based Content Grade (<30%)

Others

Global Plant-based Nonwoven Fabric Market, Segmentation by Application:

Medical

Cosmetic

Food

Industrial Filtration

Clothing

Others

Companies Profiled:

Ahlstrom

Suominen Corporation

Freudenberg Performance Materials

Fitesa

Glatfelter Corporation

TWE Group

Sandler AG

Norafin Industries

McAirlaid's Vliesstoffe

Winner Medical

Hangzhou Nbond Nonwovens

D-TEX Nonwovens

Unitika Ltd.

Asahi Kasei Corporation

Daiwabo Co., Ltd.

Key Questions Answered

1. How big is the global Plant-based Nonwoven Fabric market?
2. What is the demand of the global Plant-based Nonwoven Fabric market?
3. What is the year over year growth of the global Plant-based Nonwoven Fabric market?
4. What is the total value of the global Plant-based Nonwoven Fabric market?
5. Who are the Major Players in the global Plant-based Nonwoven Fabric market?
6. What are the growth factors driving the market demand?

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